

Social Security in Review

New SSA Executive

On November 22, 1999, William A. Halter was sworn in as the Deputy Commissioner of Social Security. As the independent agency's first Deputy Commissioner, he serves as Chief Operating Officer and as Secretary to the Social Security Board of Trustees. Mr. Halter indicates that he will focus on building on existing infrastructures to develop support in the appropriations process and in developing partnerships for new legislation. "Dealing with stakeholders and with Congress has taken on added dimensions now that SSA has independent agency status," stated Mr. Halter, "and we are planning to do more to advance our relationships with both."

Mr. Halter previously served as a Senior Advisor in the Office of Management and Budget where he coordinated activities of the President's Management Council, as the Chief Economist for the U.S. Senate Committee on Finance, and as an economist for the Joint Economic Committee of Congress. Mr. Halter holds economic degrees from Stanford University and from Oxford where he was a Rhodes Scholar.

New Associate Commissioner of ORP

Former Congresswoman Barbara Kennelly, Counselor at the Social Security Administration who works closely with the Commissioner and Members of Congress, also currently holds the position of Associate Commissioner of the Office of Retirement Policy. The Office of Retirement Policy is responsible for providing analysis and development in the areas of social insurance, financing, and economic policy.

A life-long resident of Hartford, Connecticut, Ms. Kennelly received a Bachelor of Arts degree in economics from Trinity College, Washington, D.C. She earned a certificate from the Harvard Business School on completion of the Harvard-Radcliffe Program in Business Administration, and a Master's degree in Government from Trinity College, Hartford. Prior to joining SSA, former Congresswoman Kennelly served 9 terms in Congress and was the Secretary of the State of Connecticut. She replaces James Roosevelt who left the agency in November 1999.

SSA's Electronic Newsletter

Get the latest Social Security news at the click of the mouse. Beginning March 1, 2000, the Social Security Administration (SSA) will send Social Security news as it happens to individu-

als and organizations across America who request it. SSA's new service, Social Security e-news, is an electronic newsletter available free to subscribers through the Agency's Internet site, Social Security Online. Beginning February 15, subscribers can sign-up for Social Security e-news by providing their e-mail address.

"Social Security e-news will provide the latest Social Security information to subscribers the minute it is made public," said William Halter, Deputy Commissioner of Social Security. "We hope that beneficiaries, workers, employers and professionals who handle Social Security issues will all find Social Security e-news very useful and timely."

Subscribers to Social Security e-news will have several options available to them. Just by subscribing, they will receive a monthly newsletter containing general Social Security news. The stories will relate to current program developments and related events and be geared to the information needs of both current workers and beneficiaries.

In addition to the monthly general newsletter, subscribers can also elect to receive timely news updates on specific topics. Subscribers will be able to select specialized news in the areas of:

- Disability
- Law and Regulations
- Retirement
- Press Office
- Survivors
- Wage Reporting
- Supplemental Security Income (SSI) Issues
- Data, Studies, and Research
- Medicare

Each brief story contained in Social Security e-news will be hyperlinked to the location on SSA's Web site where more information on the subject is available. Social Security e-news will provide subscribers with quick access to the vast volume of information generated on Social Security Online without the need to surf the 'net.' It will put information at their fingertips and help create a fuller awareness of Social Security information available on SSA's Internet site.

"This free voluntary electronic newsletter is the latest in a series of Social Security initiatives to increase the public's understanding of the Social Security program and its benefits to them," Deputy Commissioner Halter said.

Interested groups, organizations or individuals will be able to subscribe to Social Security e-news through the link on SSA's Web site, Social Security Online, at <www.ssa.gov> or they can go directly to the e-news subscription form at <www.ssa.gov/enews>. Subscribers will also be able to forward e-news to other interested parties. Recipients also have the ability to quickly subscribe to the service with a click of a mouse.

Ticket to Work and Work Incentives Improvement Act of 1999

On December 17, 1999, President Clinton signed into law H.R. 1180, the Ticket to Work and Work Incentives Improvement Act of 1999. Commissioner Apfel noted it as one of the most significant changes to disability policy in the last 20 years. Under the new law, the Commissioner is required to establish a new program within SSA--the Ticket to Work and Self-Sufficiency program--no later than 1 year after date of enactment. The new program would provide Disability Insurance (DI) and Supplemental Security Income (SSI) disabled beneficiaries with a ticket to obtain vocational rehabilitation (VR) services, employment services, and other support services from approved providers from which they may select. Providers are established under the employment network to provide services under the program.

The 1999 Act also directs the Commissioner, in consultation with the Work Incentives Advisory Panel, to establish a community-based work incentives planning and assistance program. The purpose of the work incentive program is to provide accurate information related to work incentives to disabled beneficiaries. Under the program, the Commissioner is directed to:

- establish a competitive program of grants, cooperative agreements, or contracts to provide benefits planning and assistance, including information on the availability of protection and advocacy services, to disabled beneficiaries;
- conduct directly, or through grants, cooperative agreements, or contracts, ongoing outreach efforts; and
- establish a corps of work incentive specialists within SSA who specialize in title II and title XVI work incentives for the purpose of providing accurate information.

The legislation also extends premium-free Medicare Part A coverage for disability beneficiaries who return to work for 4 1/2 years beyond the time provided under current law, effective October 1, 2000.

Foster Care Independence Act of 1999

On December 14, 1999, the President signed into law the Foster Care Independence Act of 1999 (Public Law 106-169). The law includes provisions relating to foster care and the OASDI and SSI programs, and establishes a new title VIII of the

Social Security Act for providing special cash benefits to certain World War II veterans.

Title II of the bill includes OASDI and SSI provisions. The provisions:

- Make a representative payee liable for an OASDI or SSI overpayment caused by a payment made to a beneficiary who has died. Also requires SSA to establish an overpayment control record under the representative payee's Social Security number.
- Require the Commissioner to recover SSI overpayments from SSI lump-sum amounts by withholding 50 percent of the lump sum or the amount of the overpayment, whichever is less.
- Extend to the SSI program all of the debt collection authorities currently available for the collection of overpayments under the OASDI program.
- Require the Commissioner to provide, on a reimbursable basis, information obtained under agreements with institutions for reporting prisoners to Federal or federally assisted cash, food, or medical assistance programs.
- Include in the countable resources of an individual for SSI purposes, the assets of any trust containing property transferred from the individual or spouse to the extent that the assets could be used for the benefit of either.
- Provide a penalty under the SSI program for the disposal of resources at less than fair market value.
- Add a new penalty of nonpayment of OASDI and SSI benefits for individuals found to have made a statement or representation of material fact for use in determining eligibility for benefits under the OASDI and SSI programs that the individual knew, or should have known, was false or misleading or omitted a material fact.
- Bar representatives and health care providers from the OASDI and SSI programs if they were found to have helped commit fraud.
- Deem the SSA's data privacy standards to meet all State privacy standards for purposes of sharing data.
- Require the Commissioner in consultation with the OIG and the Attorney General to undertake a study to identify possible measures to reduce fraud for those receiving OASDI based on disability and all SSI beneficiaries and to improve processing of those beneficiaries' reported changes of income. Also requires a report to the House Committee on Ways and Means and the Senate Finance Committee on legislative and administrative recommendations in these areas.
- Require SSA to include in its annual budget an itemization of the amount of funds required to support efforts to combat fraud by applicants and beneficiaries.

- Require the Commissioner to conduct periodic matches with Medicare and Medicaid data held by the Secretary of HHS, and permits the Commissioner to substitute information from the matches for the physician's certification otherwise required in order to maintain the full benefit level of an individual whose institutionalization is expected not to exceed 3 months.
- Provide that the Commissioner may require SSI applicants and beneficiaries to provide authorization for SSA to obtain any and all financial records from any and all financial institutions.
- Establish a new title VIII of the Social Security Act, that would entitle every individual who is a "qualified individual" to a monthly benefit paid by the Commissioner of Social Security for each month after September 2000 (or sooner, if administratively feasible) that such individual resides outside of the 50 States, District of Columbia, and the Northern Mariana Islands.
- Provide that the amount of the special benefit for a month would be an amount equal to 75 percent of the SSI FBR, minus the amount of the individual's "benefit income" for such month.
- Authorize the Commissioner to prescribe regulations to make administrative arrangements necessary to carry out the special benefit program. Also authorizes the Commissioner to determine when and how benefits would be paid, and provides the authority for redetermining eligibility and suspending and terminating benefits under specified conditions.
- Make conforming amendments for reimbursing the Social Security trust funds for administrative expenses, adding the special benefit program to the programs under the auspices of the Social Security Advisory Board, making civil monetary penalty provisions applicable to the special benefit program, and authorizing recovery of SSI and OASDI overpayments from special benefits.
- Require the Commissioner to study the reasons why family farmers with resources of under \$100,000 are denied SSI benefits, including whether the deeming policies discriminate against family farmers. The study would include the number of family farmers who have been denied benefits in each of the past 10 years. The Commissioner is required to submit a report to the House Ways and Means Committee and Senate Finance Committee with the results of the study within 1 year.

Foster Care Provisions

Below is a summary of foster care provisions under Public Law 106-169.

- Title I of the bill provides States with flexible funding to help children who are likely to "age out" of foster care at age 18 to obtain employment or continue their education. States would promote the self-sufficiency of these young people by providing assistance in obtaining a high school diploma, post-secondary education, career exploration, housing, vocational training, job placement and retention, training in budgeting, substance abuse prevention education, and education in preventive health measures including smoking avoidance, nutrition education, and pregnancy prevention.
- Title I also increases the current-law resource limit of \$1,000 to \$10,000 for the purpose of determining a child's eligibility for Federal foster care payments.
- Changes in the Medicaid law permits States to provide Medicaid coverage to those aged 18, 19, and 20-year olds who have left foster care. States would also be permitted to use means testing to provide Medicaid to former foster care youths if their income and resources are below certain specified levels.
- Title I of the bill increases funding for adoption incentive payments.